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USER MANUAL

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Introduction to BxItems

What is BxItems?

Items - Anything that can be described in words or files. Examples include office supplies, research reagents, specimens and samples, regular files, gene sequences, research articles, images, videos, and even hyperlinks.

Containers - Anything that items can be put in, both physically or theoretically. For example, a freezer can have many racks and boxes, a box can have 10 by 10 grids and store small tubes, "My lab members" can have a list of group members (name, office location, e-mails, and so on), "My publications" can have a list of research articles, "My favorite websites" can have a list of website URLs.

BxItems™ is a cloud-based information system that:

- tracks many types of item information (name, barcode, vendor, quantity, storage ...)
- organizes items into containers
- provides convenient tools for data entry and editing, searching, relocation, and sharing.

BxItems is a secure web-based system for managing containers, items and sample locations inside your facility. This storage and materials management tool provides a flexible virtual image of your storage system. It not only tracks items on hand but also lists open spaces to help place new arrivals. Conveniently check for all the required materials for an experiment right from your computer.

BxItems tracks container item information with barcode labels! Containers, samples and results are easy to locate and track with greater accuracy. With BxItems, you will know the location of every container, item and sample in the laboratory or department! The system allows laboratories to organize items easily and efficiently by scanning or entering a barcode to retrieve complete item details and history.

BxItems helps control inventory tracking with a check in and check out system. When you check out a container, reagent or item, you can record the amount left in the container for tracking reordering and usage measurements.

Key Features

- **Easily create a storage hierarchy with BxItems**
Virtually model your storage facilities or model your process flow through your Lab regardless of their complexity. Our inventory control tracking system allows as many levels as needed. Start at the facility site level and progress from building down to individual sample tubes.
- **Complete visibility**
Locate stored items easily on screen with a visual hierarchy tree view and integrated search tools. Quickly browse containers and know if you have all the resources needed before you start an experiment.

- **BxItems provides an easy and affordable way of container tracking.**
BxItems supports barcode inventory management. Each Item and container has a unique barcode. You can easily track what is on hand and where it is stored.
- **BxItems helps control inventory tracking with a check in and check out system.**
When you check out a container or item, you can record the amount left in the container for tracking reordering and usage measurements.
- **Export data**
BxItems' export tool provides a table view of the materials' data.
- **Intrinsic group-based functionality**
Laboratory group members can use the system to coordinate their material usage. BxItems encourages laboratory collaboration through a whole suite of online tools to increase the quality of your research and results.

Barcode-powered Item Tracking with BxItems

BxItems management system tracks container and sample information with barcode labels! Using barcodes is common in large, complex inventory and tracking systems. It is standard in the BxItems inventory control and tracking system. Our tracking system allows laboratories easy and efficient management of their items and samples by scanning or entering a barcode to retrieve the complete item details and history. With BxItems, you will know the location of every container, item and sample in the laboratory!

- **BxItems provides an easy and affordable way of container tracking.**
Our system supports barcode inventory management. Our online tracking system is compatible with many of the popular brands of barcode scanners. These scanners are affordable, easy to use and require little upkeep. Ask us about how we can supply you with 100% BxItems compatible hand scanners today.
- **Use the barcode to track items.**
Every location and every item stored has a unique barcode for inventory tracking. Container and sample tracking is simple and more accurate. You can easily control what is on hand and where it is stored. Our barcode tracking system lets you track the amount that is used, and by whom.
- **Retrieve container or item information quickly.**
Scan the barcode or enter the identity code to quickly retrieve all the recorded information in our sample tracking system. Our tracking software reduces the amount of time in the freezer. This will help keep your samples at a more stable temperature and reduce spoilage.
- **Update container or item information easily.**
Permissions can be set to control unauthorized editing or deletion. Our tracking management system protects the integrity of your data.
- **BxItems helps control inventory tracking with a check in and check out system.**
When you check out a sample or item, you can record the amount left in the container for tracking, reordering and usage measurements. The check in and check out is barcode compatible too. You can scan all the items you need and when you are done, you can check out or check in all the items on your list. We will also check to make sure that the items you check out are not spoiled or in use by someone else.

Inventory Tracking with BxItems

It is simple to view and manage your containers and items online. The tree view helps you quickly see your entire inventory. The dynamic menu makes our online inventory system intuitive and easy to use. Item tracking and viewing is just as simple with our table view and box view.

BxItems provides a hierarchy tree view of storage containers.

Each container in the tree is a live link: click on the container to see what is stored there. This could be a building, a workbench in your laboratory or a step in a multi-step process. You can easily mix and match locations and steps for maximum control and management of your inventory. Each container can be of a custom type. Users can simply relocate the containers through drag-and-drop right on the tree view. With our system you have full control of your inventory online without custom programming.

BxItems' simple dynamic menu is easy to use!

With such detailed control of your inventory, you might think that the controls are just as complicated. Actually, there are many intuitive shortcuts to make our online inventory tracking system even more simple to use. The dynamic menu shows you what you can do next. Your time in the lab should be spent on research not learning how to navigate your inventory control and tracking system.

Full search item management.

Buying in large quantities means savings but also tracking usage and knowing what is on hand can be difficult to verify visually. BxItems allows you to do a full search of all items on site or items in a lab, freezer, or process step. You can see what is there and even export them out to a file for your records. Inventory control becomes simple, just search for items that are low and print it out. Items are listed with as much detail or as little detail as you need. When you click on the item you can view the full details about the item.

Convenient 'Storage Box' view.

Many small items are kept in boxes, drawers, or cabinets with many small containers or cells to hold your inventory. Take control of all these small and easily lost items in your laboratory. BxItems offers a fast and simple to use 'Box' storage view for tracking your samples. You can move samples around online in the virtual box with a simple drag and drop. This view gives you a convenient visual management of your inventory when getting items out or when putting items away.

Section 1: Tour of BxItems Main Screen

The BxItems Main Screen Has Three Major Areas:

- My Group Items
- Container Tree
- Top containers

My Group Items

From the Group Items Area, you can add, look up, check in, check out, or import items.

Click on any link to perform an action.

My Group Items [Hide This Panel](#)

[Add Items](#) • [Look Up](#) • [Check In](#) • [Check Out](#) • [Relocate](#)

Summary Screen

The summary screen shows the total number of items , Stored Items, Unstored Items, Expiring Items, Expired Items, and Low Quantity Items. All hyperlinks will direct you to the main items page.

My Group Items [Hide This Panel](#)

[Add Items](#) • [Look Up](#) • [Check In](#) • [Check Out](#) • [Relocate](#)

Total Items: **3 (31)**

Unstored Items: **2 (12)**

Stored Items: **2 (19)**

Expiring Items(15 days): **0 (0)**

Expired Items: **2 (16)**

Low Quantity Items: **2**

Selected Items: **0**

Search Items: [Go](#)

Item Usage: [Browse](#) You can search items or browse usage here.

[» Advanced Item Tools](#) [» Import](#) [» From BxOrders](#)

List of Items (Displaying 1 - 27 of 27 records, Page 1 of 1.)

[New](#) [Update](#) [Delete](#) [Export](#)

No.	Name	Description	Expiration	Manufacturer	Quantity Stored	Quantity Unstored	Date Purchased	Date Received	Fund	Lot Number	Volume
1	USB 1			Sony	16	0				11222	
2	Reagent B		2012-05-09		18	0					3.5
3	Reagent A	New Reagent	2011-12-01	BioInfoRx	6	0	2011-02-01	2011-03-01	PO#1	x3456	
4	Reagent B		2012-05-09		7	0					3.5

Container Tree

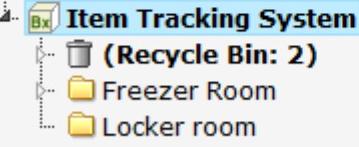
The Container tree is for setting up your containers and storage areas for storing your items.

Container Tree View

Active Container: (Not set yet)

Search Container: [Go](#)

[Set Active](#) [Add](#) [Update](#) [Copy](#) [Delete](#) [Clear](#)



```

Bx Item Tracking System
├── Recycle Bin: 2
│   ├── Freezer Room
│   └── Locker room

```

The container tree can have several layers, starting with the largest area and subdividing into smaller storage areas.

Top containers and Unstored Items

The right hand side of the BxItems Main Screen previews your top containers and any Unstored Items.

Top Containers

No.	Barcode	Storage	Properties
1			Topic: 99009000 Name: Recycle Bin Max Volume: 1000000 Description: Recycle Bin
2			Topic: Freezer Room Name: Freezer Room Max Volume: 1000000 Description:
3			Topic: Locker room Name: Locker room Max Volume: 1000000 Description:

Unstored Items

Note: To return items to their original container, click the container name and use the 'Move' action.
To Import item info (this container only):

Selected	Barcode	Storage	Properties
<input checked="" type="checkbox"/>			Name: Reagent A Quantity: 11 Expiration:

Section 2

Adding New Items

Add Items Using the Add items function

My Group Items [Hide This Panel](#)

[Add Items](#) • [Look Up](#) • [Check In](#) • [Check Out](#) • [Relocate](#)



To add NEW items, use the “Add Items” function (checking in more of the same item will be reviewed later).

Clicking on the “More” Link will reveal more categories to enter.

Record New Items [BxItems](#) [Browse](#)

Type:

Name: [» More](#) 

Quantity: 1

Unit: Each [» More](#)

Vendor: [» More](#)

Expiration Time: Lot Number:

Cost Per Item: Quote Number:

Date Validated: Validate Reagents:

Comments:


Files:

[Clear all fields](#)

To add your items, enter as much data as you need. You do not need to fill in every category, but Name and Type are required.

The example below shows the third area with the “More” revealed.

Be sure to save your new item!

Vendor: [» More](#) Enter date for expiration if needed, also a minimum quantity. Entering this data will add your items to the low quatity and expiring database.

Expiration Time: Lot Number:

Cost Per Item: Quote Number:

Date Validated: Validate Reagents:

Vendor Code: Catalog:

Date Manufactured: Safety Level:

Storage Instruction:

Purchased By: Date Purchased:

Receipt Info:

Maximum Quantity: Minimum Quantity:

Comments: Any file can be attached here. An image file will show a picture of the container or item.

Files:

Add Items Using the Import Tool

Items may also be imported from Excel. Use the BxItems Import tool to import new items.

The screenshot shows a summary of item status: Total Items: 27 (124), Unstored Items: 7 (16), Stored Items: 21 (108), Expiring Items (15 days): 0 (0), and Expired Items: 23 (104). It also shows Low Quantity Items: 7 and Selected Items: 0. A search bar and a 'Item Usage' link are present. At the bottom, there are links for 'Advanced Item Tools', 'Import' (which is circled in red), and 'From BxOrders'.

Download the Excel Template and enter your items under the correct heading. You may leave cells blank, but do not delete headings. Copy and Paste your data including headers into the import box, and import.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	
1	Type	Code	Name	Description	Project	Fund	Manufacturer	Manufacturer_Code	Manufacturer_Catalog	Date_Manufactured	Safety_Level	Expiration	Tim	Instructn	Purchased
2	Reagent	Code1	Name1	This is des Project#1	PO#1	BioInfoRx	BxA#F#1	BxA#F#mLIMS	1/1/2011	no	12/1/2011	Computer	Guest		
3	Reagent	Code2	Name2	This is des Project#2	PO#2	BioInfoRx	BxA#F#2	BxA#F#mLIMS	1/2/2011	no	12/2/2011	Computer	Guest		
4	Reagent	Code3	Name3	This is des Project#3	PO#3	BioInfoRx	BxA#F#3	BxA#F#mLIMS	1/3/2011	no	12/3/2011	Computer	Guest		
5	Reagent	Code4	Name4	This is des Project#4	PO#4	BioInfoRx	BxA#F#4	BxA#F#mLIMS	1/4/2011	no	12/4/2011	Computer	Guest		
6	Reagent	Code5	Name5	This is des Project#5	PO#5	BioInfoRx	BxA#F#5	BxA#F#mLIMS	1/5/2011	no	12/5/2011	Computer	Guest		
7															

The screenshot shows an Excel template with sample data for reagents. The template includes columns for Type, Code, Name, Description, Project, Fund, Manufacturer, Manufacturer_Code, Manufacturer_Catalog, Date_Manufactured, Safety_Level, andExpiration. Below the template, there are buttons for 'Upload Data' (circled in red), 'Example Data', 'Excel Template', and 'Clear Data'.

Your imported items will be stored in a temporary container. You may move items from the temporary container to unstored, or you may move them from the temporary container to another container (See Section 7 for relocating items). You may delete the temporary container when the items have been moved out (see Section 3: Deleting containers).

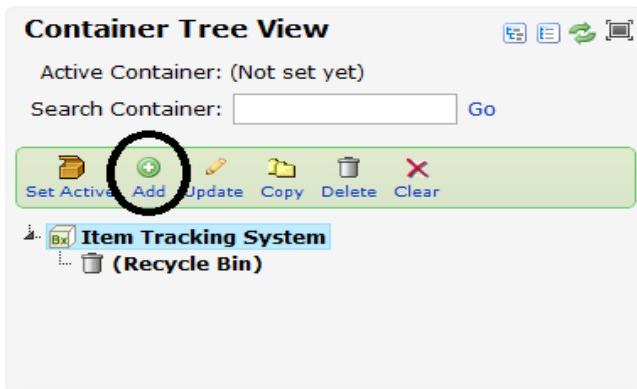
Section 3: The Container Tree

Setting Up Containers and Sub Containers

Use a Top-Down system, beginning with your largest area.

Tier 1: Your Lab Name

1. Select “Item Tracking system” for the highest level and click “Add.”



2. Fill in container information. Since this is the largest container, it holds both sub-containers and grids. The lab itself doesn't have designated storage grids. Attach a photo if you wish, to help aid in locating rooms, closets, freezers, etc.

The screenshot shows the 'Set up New Containers' form. At the top, there's a message: « (2011-9-24 12:05:12 AM) Container Item Tracking System is selected.» Below this is a back arrow icon.

Set up New Containers

Container Type: Laboratory e.g., Room, Freezer, Shelf, Rack, Box, Plate ...

Name: My Lab

Description: This laboratory has 3 main rooms and 4 storage rooms

Storage Types: Holds sub-containers or grids only Stores items only Both

Grids In Container: No Yes (e.g. Box, Plate ...)

Photo: Choose File No file chosen

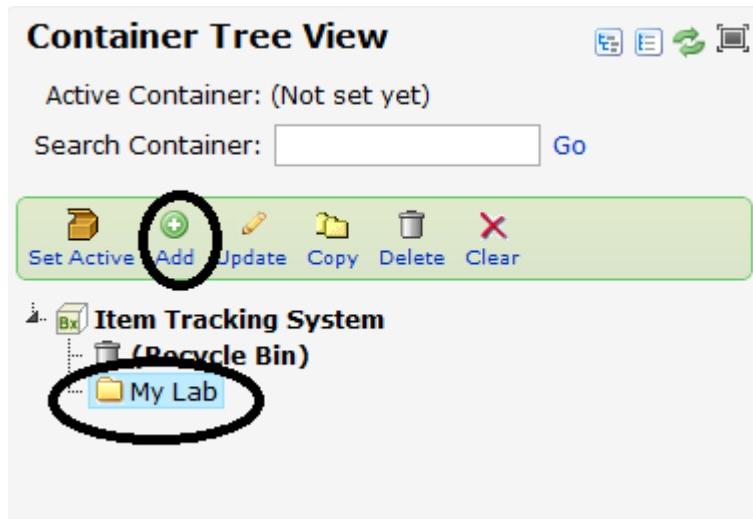
File 1: Choose File No file chosen

File 2: Choose File No file chosen

Submit

Tier 2: Room Within a Lab

1. Select "Your lab name" for the next level and click "Add."



2. Enter your information. Since this is a room, it holds sub-containers and items. The room itself doesn't have designated storage grids. Attach a photo if you wish, to help aid in locating rooms, closets, freezers, etc.

The screenshot shows the 'Set up New Containers' form. At the top, there's a message: '* (2011-9-24 12:20:28 AM) Container My Lab is selected.' The form fields include:

- Container Type:** Room (e.g., Room, Freezer, Shelf, Rack, Box, Plate ...)
- Name:** Room 1
- Description:** Lab Room 1 has 1 Storage Closet, 2 Freezers, 3 Lab Stations, and 2 Trolleys
- Storage Types:** Radio buttons for 'Holds sub-containers or grids only', 'Stores items only', and 'Both' (the last one is selected and circled).
- Grids in Container:** Radio buttons for 'No' (selected) and 'Yes (e.g. Box, Plate ...)'. Below this are three file input fields labeled 'Photo', 'File 1', and 'File 2', each with a 'Choose File' button and a note 'No file chosen'.

Note that as you build your tree, BxItems will track it for you.

The screenshot shows two panels side-by-side. The left panel, titled 'My Group Items', displays statistics: Total Items: 0, Unstored Items: 0, Selected Items: 0, and a search bar. Below this is the 'Container Tree View' which shows a tree structure under 'Item Tracking System'. The root node is '(Recycle Bin: 9)' with a sub-node 'My Lab'. The 'My Lab' node has a sub-node 'Room 1'. A circled 'Add' button in the toolbar and the 'Room 1' node in the tree are highlighted with red circles. The right panel, titled 'BxItems > My Lab', shows a QR code, a description of the laboratory (2 main rooms and 4 storage rooms), and a table for 'Sub-containers'. The table has one row for 'Room 1', showing its properties: Type: Room, Name: Room 1, Max Items: 1000000, and a description: 'Room 1 has 1 Storage Closet, 2 Freezers, 3 Lab Stations, and 2 Trolleys'. A circled 'Total Items: 0' is also present in this panel.

Tier 3: Add a Freezer or Other Storage Location

1. Select “Your room name” for the next level and click “Add.”

This screenshot shows the 'Container Tree View' panel. The tree structure under 'Item Tracking System' includes '(Recycle Bin: 9)' and 'My Lab'. A new node, 'Room 1', has been added as a child of 'My Lab', indicated by a circled 'Add' button in the toolbar and a circled 'Room 1' node in the tree.

2. Fill In your information. Your freezer has 3 shelves and holds sub-containers only.

Set up New Containers

Container Type: e.g., Room, Freezer, Shelf, Rack, Box, Plate ...

Name:

Description:

Storage Types: Holds sub-containers or grids only Stores items only Both

Grids in Container: No Yes (e.g. Box, Plate ...)

If Yes, Grid Size: X

Grid Container Type: e.g. Room, Freezer, Shelf, Rack, Box/Plate ...

Grid Storage Types: Stores items only Holds sub-containers only Both

Photo: No file chosen

File 1: No file chosen

File 2: No file chosen

Note that your freezer now shows three shelves in the container view.

No.	Barcode	Images	Properties
1			Type: shelf Name: Shelf 1 Max Items: 3 Description:
2			Type: shelf Name: Shelf 3 Max Items: 1 Description:
3			Type: shelf Name: Shelf 2 Max Items: 1 Description:

Container Grids and Stored Items

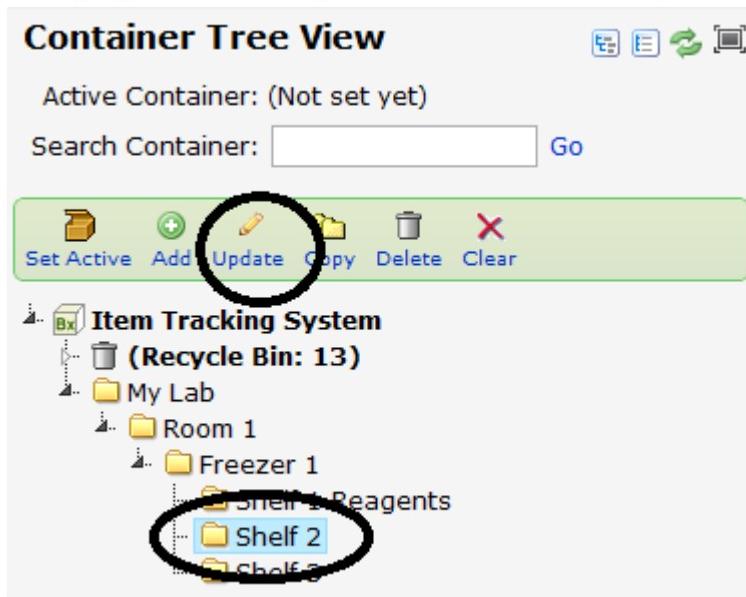
Freezer: **Freezer 1**
[↳ Store Items Here](#)



Edit Containers

You can re-name your freezer shelves to specify their use. **WARNING: Changing the name of a container will remove its subcontainers. Be sure that there are no subcontainers when editing. After the container is edited, new subcontainers can be added.**

Highlight on the item you wish to edit and click "update." (shelf 2 is the example).



1. Update any necessary information (name of shelf, number of items allowed on shelf, grid size)

Update Container Settings

Type: e.g., Room, Freezer, Shelf, Rack, Box, Plate ...
Name:
Description:

Items Allowed: "0" means this container can only hold subcontainers.
If container has grid (e.g. Box):
Grid Size: X Maximum items in each grid:
Size "1 X 1" means this container does not have grid.

Photo: No file chosen
 File 1: No file chosen
 File 2: No file chosen

Store Items in a Container

You can now add items to your shelves in the freezer. Begin with the shelf you wish to add items to and click "store items here." You will be allowed to add as many items as you specified for each grid.

The screenshot shows two windows side-by-side. On the left is the 'Container Tree View' window, which displays a hierarchical tree structure of storage locations. A folder named 'Shelf 2 - Specimens' under 'Freezer 1' is highlighted with a red oval. On the right is the 'Container Grids and Stored Items' window, showing a 3x3 grid for 'Shelf 2 - Specimens'. The grid has columns labeled 1, 2, 3 and rows labeled A, A1, A2, A3. The cell at position A1 contains the value '1'. The cell at position A2 contains the value '2'. The cell at position A3 contains the value '3'. A red oval highlights the link 'Store Items Here' located above the grid.

You may now begin moving unstored items to grids on the shelf. Simply drag and drop, and click "save" when finished.

Store Items in Container [Home](#)

Tip: To put an item in a container, drag the item icon and drop it in the container. To save, click "Save Storage Information" link.

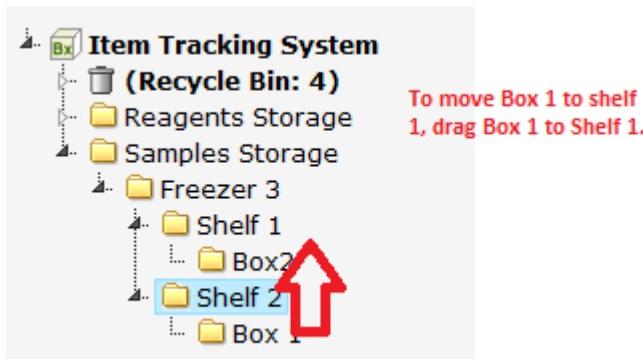
This screenshot shows the 'Store Items in Container' interface. At the top, there's a table titled 'Unstored Items (Total: 2)' listing two items: 'Reagent 1' and 'Specimen 1'. The 'Drag' column for both items has a small icon with a circular arrow, which is circled in red. Below the table is a 'Drop Zone' area containing a green circle with a white crosshair. The text '1 Items Stored' is displayed above the button 'Auto Allocate'. At the bottom, there's a shelf grid labeled 'Shelf 2 - Specimens' with three columns (1, 2, 3) and three rows (A, A1, A2). The cell A1 contains '10002452'. A large red arrow points from the 'Drag' column of 'Specimen 1' in the table towards the 'Drop Zone' area. To the right of the shelf grid, there are buttons for 'Save' and 'Reset', both of which are circled in red.

Additional subcontainers, such as boxes, can be added to the shelf. Indicate "stores subcontainers only" when creating shelves.

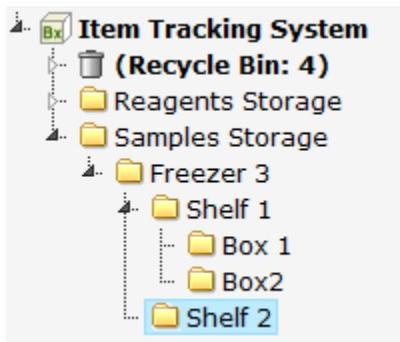
Manipulating Containers

Relocating Containers

Containers can be moved easily in the tree view by using drag and drop. Open your tree and select a container to move with your mouse, and drag it into the desired location. When you begin dragging your item, it will have a small red X. When your mouse reaches the desired location, you will see a green checkmark, and the item can be dropped.

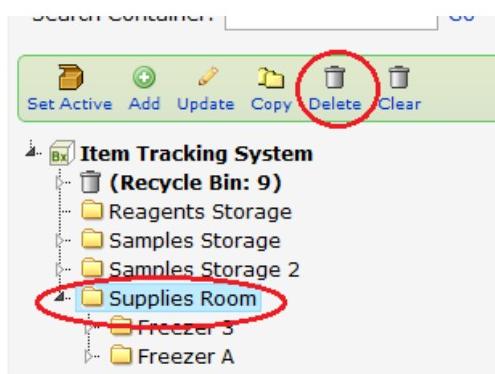


Box 1 will now be on shelf 1.



Deleting Containers

Containers may be deleted at any time. Move all items out (see section 7) before deleting a container. Select the container you wish to delete, and click on “delete.” The container will be moved to the recycle bin until it is permanently deleted.



Section 4: Browse and Search items

Browse Items

To view, browse, and search your items in a list format, click on your “Total Items” Link and you will be directed to the browse/search items screen.

My Group Items [Hide This Panel](#)

Add Items • Look Up • Check In • Check Out • Relocate	
Total Items:	27 (124)
Unstored Items:	7 (10)
Stored Items:	21 (108)
Expiring Items(15 days):	0 (0)
Expired Items:	23 (104)
Low Quantity Items:	7

All columns in Browse view are sortable. Click on any column header to sort.

Click on any link to view all items, stored or unstored items, low quantity items, etc.



List of Items (Displaying 1- 27 of 27 records. Page 1 of 1.)									
No.	Name	Description	Expiration	Manufacturer	Quantity Stored	Quantity Unstored	Date Purchased	Date Received	Fund
1	USB 1			Sony	16	0			11222
2	Reagent B		2012-05-09		18	0			3.5
3	Reagent B		2012-05-09		7	0			3.5
4	Animal Sample				2	0			
5	Sample B		2012-06-08		19	0			Party Fund
6	Chicken		2012-06-08		4	0			Party Fund

Set Default Columns

You can select the order of the column view, as well as the default columns you would like displayed.

1. Choose "Set Default Columns"
2. Move Available Fields to Selected Fields to add more; move Selected Fields to Available Fields to remove columns.
3. Move fields up or down in Selected Fields to change the order.
4. Click "Apply Changes" and your new column view will appear.

Items: All - Stored Items - Unstored Items - Low Quantity Items - Expired Items

The screenshot shows a configuration dialog for setting default columns. At the top, there are links for 'Search', 'Browse All Records', 'Set Default Columns', and 'Print Search Result'. A red box highlights the 'Set Default Columns' link. Below it, a message says 'Use arrows to move fields from available to selected, or vice-versa,' with an 'X' button in the top right corner.

Select Fields to Display:

Available Fields:	Selected Fields:
Date Manufactured	>>
External Code	All >>
Manufacturer Catalog	
Manufacturer Code	<<
Max Quantity	All <<
Min Quantity	

A red circle highlights the '>>' button in the Available Fields section and the '<<' button in the Selected Fields section. Another red circle highlights the 'Manufacturer' field in the Selected Fields list.

* You can hold the Ctrl key to select multiple fields.

Field Sorting Options:

Sort By: Code Ascending

Add More Sorting Criteria

Apply Changes Reset

Search Items

Search for Items using the Search function.

Items: All - Stored Items - Unstored Items - Low Quantity Items - Expired Items

The screenshot shows a search interface. On the left, there is a 'Search' button highlighted with a red circle. Next to it are 'New Search' and 'Browse' buttons. To the right is a filter dropdown set to 'Contains' with a red circle around it, followed by a text input field and an 'Add More' button. Below these are dropdown menus for 'Text' (highlighted with a red circle) and 'Numbers'.

List of Items (Displaying 1 - 27 of 27 results)

New Update Delete Export

No.	Name	Description	Manufacturer	Quantity Stored	Quantity Unstored	Date Purchased	Date I
1	USB 1			16	0		

You can search any fields, or choose a specific field from the pull-down menu. You may also choose an operator from the second pull down menu. If you need to narrow or expand your search, select “add More” and use **or** to expand, or **and** to narrow.

Items: All - Stored Items - Unstored Items - Low Quantity Items - Expired Items

Search: Any Fields Contains
 And Or Any Fields Contains Remove
Add More

Section 5: Check Items in and Out

Items can be checked in or out using barcodes (see Section 8 for printing barcodes), or by navigating to the item and selecting “check in” or “Check Out.” You will need to have a 1-D Barcode scanner attached to your computer for standard barcode reading, or, you can scan 2-D barcodes using a QR reader on your Internet-Enabled touch pad with a camera. BxItems will keep track of the number of checked out items.

Check Items In or Out By Scanning a Barcode

1. Select “Check In or Check Out Items” from the home screen.

My Group Items [Hide This Panel](#)

Add Items • Look Up **Check In • Check Out • Relocate**

Total Items: **27 (124)**

Unstored Items: **7 (16)**

Stored Items: **21 (108)**

Expiring Items(15 days): **0 (0)**

2. Scan the barcode using your 1-d barcode scanner or 2-d barcode reader. Your cursor must be in the barcode box.

Check Out Items 

Scan the item barcode and the item information will list.

Item ID or Barcode:

Notes:

3. Once the item is scanned, all items containing that barcode will appear in the list.

Check Out Items

Item ID or Barcode: Select the number of items you are checking out, add any comments, and click on "Check Out Items."

Animal Sample ! (ID: 10001302, Code: 10001302)

Batch	Checkout	Available	Container	Date Stored	Stored By
20001039	<input checked="" type="radio"/> 1	2	Box2	2012-05-16 13:04:52	

Notes:

Check Items In or Out Without Scanning a Barcode

If a barcode scanner is not available, items may also be checked in and out by navigating to the item you wish to check out and select the “Check In” or “Check Out Option.

Navigate to your item using browse, search, or click on an item in its container.

	1	2	3	4	5	6
A	A1 10001303 Sample B	A2 10001303 Sample B	A3 10001303 Sample B	A4 10001303 Sample B	A5	A6
B	B1 Select Sample B from this grid to check out	B2	B3	B4	B5	B6
C	C1	C2	C3	C4	C5	C6
D	D1	D2	D3	D4	D5	D6

Select the Option you would like, and you will then be directed to the regular check out screen.

Item Information



10001303

Actions: • Update or Copy • Check In • Check Out • Relocate • Usage Summary

Total Quantity: 19

Batches:

Time Added	Added By	Quantity	Notes	Container
2012-06-01 11:28:16		1		» Room: Samples Storage » Freezer: Freezer
2012-06-01 11:28:17		1		» Room: Samples Storage » Freezer: Freezer
2012-06-01 11:28:17		1		» Room: Samples Storage » Freezer: Freezer
2012-06-01 11:28:17		1		» Room: Samples Storage » Freezer: Freezer
2012-05-16 13:04:12		1		» Room: Samples Storage » Freezer: Freezer
2012-05-16 13:04:12		1		» Room: Samples Storage » Freezer: Freezer

Section 6: Update and Copy Items

You can update existing items or add new items that are similar to already added items by using the Update or Copy Items function. Any item can be updated or saved as a new item.

Update or copy an item

1. Navigate to the item you would like to update, and select “update or copy item.”

Item Information Home

QR Code
10001299

Actions: [Update or Copy](#) • Check In • Check Out • Relocate • Usage Summary

Total Quantity: 6

Batches:	Time Added	Added By	Quantity	Notes	Container
	2012-05-08 12:50:12	-	1		» Room: Supplies Room » Freezer: Freez
	2012-06-12 15:03:22		5		» Room: Samples Storage 2 » Freezer: Fi

2. Enter your new information. To update an existing item, select “update,” or you can save it as a new item.

Record New Items or Update Current Item

Type: Reagent

Name: ReagentA [» More](#)

Quantity: 6

Unit: Each [» More](#)

Vendor: BioInfoRx [» More](#)

Expiration Time: 2011-12-01 Lot Number: x3456

Cost Per Item: Quote Number:

Date Validated: 2011-03-01 Validate Reagents: Anne

Comments:
No comments

Files:  [Attach files](#) [» Select files](#) [» Clear list](#)

Save As New Item **Update Item Information** **Clear all fields**

Edit Fields in an Existing Item

To edit any of the fields in an existing item, navigate to the item you wish to edit.

Item Information



10001299

Actions: • Update or Copy • Check In • Check Out

Total Quantity: 6

Batches:

Time Added	Added By	Quantity
2012-05-08 12:50:12	..	1
2012-06-12 15:03:22	..	5

Tip: Click the highlighted value to edit.

Name: ReagentA

Barcode: Code1

Manufacturer: BioInfoRx

Catalog: BxAF#mLIMS

Click on the field to edit,
enter information, and
click "OK."

Lot Number: x3456

Date Validated: 2011-03-01 00:00:00

Expiration Time: 2011-12-01 00:00:00

Cost Per Item:

OK

Cancel

Quote Number:

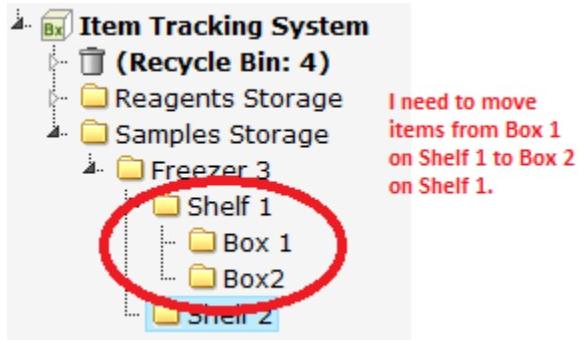
Validate Reagent: Anne

Section 7: Relocate Items

Relocating Items to a New Container Method 1

To relocate items to a new container, begin by opening up your container tree to view the containers you wish to move the items from and the container they are being moved to.

For example, all items in Box 2, shelf 1, need to be moved to Box 1, Shelf 1.



Step 1: Select the container you want to move the items to and set it as the active container.

1. Select Box 1 (click to highlight)
2. Select "Set Active."
3. Active container will appear in blue.

Container Tree View

Active Container: **Box 1** 3

Search Container: 2 Go

Set Active Add Update Copy Delete Clear

Item Tracking System

```
graph TD; Root[Item Tracking System] --> RecycleBin["(Recycle Bin: 4)"]; Root --> ReagentsStorage[Reagents Storage]; Root --> SamplesStorage[Samples Storage]; Root --> Freezer3[Freezer 3]; Freezer3 --> Shelf1[Shelf 1]; Shelf1 --> Box1[Box 1]; Shelf1 --> Box2[Box 2]; Freezer3 --> Shelf2[Shelf 2];
```

Step 2: Go to the container you wish to move the items from and view the items, select “review stored items.”

1. Select “Box 2.”
2. Select “review stored items.”

The screenshot shows the 'Item Usage' interface. On the left, the 'Container Tree View' pane shows a tree structure of storage locations. A red circle highlights the 'Box2' node under 'Freezer 3/Shelf 1'. At the top right, there are buttons for 'Store Items Here', 'Review Stored Items' (which is circled in red), and 'Move Items Out'. To the right is a grid table with columns labeled 1 through 7 and rows labeled A through E. The grid contains data for 'Lasagna' items with code '10001303'.

	1	2	3	4	5	6	7
A	A1	A2	A3	A4 10001303 Lasagna 2012-06-08	A5 10001303 Lasagna 2012-06-08	A6 10001303 Lasagna 2012-06-08	A7 10001303 Lasagna 2012-06-08
B	B1	B2	B3	B4	B5	B6	B7
C	C1	C2	C3	C4	C5	C6	C7
D	D1	D2	D3	D4	D5	D6	D7
E	E1	E2	E3	E4	E5	E6	E7

A New screen will appear. Select the items you wish to move to the active container (Box 1).

The screenshot shows the 'Review Container Items' screen. It displays a table of items from 'Current Container: Box2' being moved to 'Active Container: Box 1'. A red circle highlights the checkbox column for items 1, 2, and 3. Another red circle highlights the 'Move Checked Items to Active Container' button at the top right.

No	<input type="checkbox"/>	Container Type	Container Name	Container Code	Item Name	Item Barcod
1	<input checked="" type="checkbox"/>	Grid	A4	90003107	Lasagna	10001303
2	<input checked="" type="checkbox"/>	Grid	A5	90003108	Lasagna	10001303
3	<input checked="" type="checkbox"/>	Grid	A6	90003109	Lasagna	10001303
4	<input type="checkbox"/>	Grid	A7	90003110	Lasagna	10001303
5	<input type="checkbox"/>	Grid	A8	90003111	Lasagna	10001303

Tip: Sort multiple columns simultaneously by holding down the shift key and clicking a second, third or even fourth column header!

Relocating Items to a new container Method 2

Items may also be relocated by scanning the barcode of the item.

- From the home Screen, Select "Relocate."

My Group Items [Hide This Panel](#)

Add Items • Look Up • Check In • Check Out • Relocate **(Relocate)**

Total Items: **27 (124)**

Unstored Items: **0 (0)**

Stored Items: **27 (124)**

- Scan the item ID to bring up the item to be relocated.

Relocate Items [BxItems](#)

Item ID or Barcode: [LookUp](#)

Sample B (ID: 10001303, Code: 10001303)

Batch	<input type="checkbox"/> Relocate	Available	Container	Date Stored	Stored By
20001054	<input checked="" type="checkbox"/>	1	90003002 (A1)	2012-06-01 11:28:16	
20001055	<input type="checkbox"/>	1	90003002 (A2)	2012-06-01 11:28:17	
20001056	<input type="checkbox"/>	1	90003002 (A3)	2012-06-01 11:28:17	
20001057	<input type="checkbox"/>	1	90003002 (A4)	2012-06-01 11:28:17	
20001574	<input type="checkbox"/>	15	90006666	2012-06-12 15:03:22	

- Look up the container you wish to move the item to. You can type in the first few letters of the container name and then select from suggested containers. When finished, click "Relocate."\\

Container: [LookUp](#). Leave blank to add unstored items

Enter container or partial name

Select Container	Location	Container	Code	Type	Items Allowed
	Supplies Room>Freezer 3>Box A	Box A	90002893	Box	-
	Samples Storage>Freezer 3>Shelf 4>Box 1	Box 1	90003002	Box	-
	Samples Storage>Freezer 3>Shelf 2>Box2	Box2	90003103	Box	-
	Samples Storage>Freezer 3>Shelf 4>Box 2	Box 2	90003204	Box	-
	Samples Storage>Freezer 3>Shelf 4>Box 3	Box 3	90003214	Box	-
	Box 1	Box 1	90003242	Box	-
	Supplies Room>Freezer 3>shelf 1>Box 5	Box 5	90006565	Box	-
	Samples Storage 2>Freezer 3>REagents Shelf>Box 5	Box 5	90006666	Box	-

Notes:

Relocate Item

Move All items Out to Unstored Status

All items are easily moved out of a container for later storage. This function will move all items in a container to unstored status.

Navigate to the container you wish to empty in the container tree. You can move all items out from this area, or you can store more items if you wish.

The screenshot shows the 'Container Grids and Stored Items' interface. On the left, the 'Container Tree View' shows a tree structure of storage locations. A node for 'Box A' is highlighted with a red oval. A tooltip 'Navigate to container to empty (Box A)' points to this node. On the right, a grid displays stored items. At the top of the grid, there is a menu with the option 'Move All Items Out' circled in red. The grid has columns labeled 1 through 7 and rows labeled A through E. Item details are visible in the first two columns of row A.

	1	2	3	4	5	6	7
A	10001773 Name1 B1/Fridge 2011-12-01		10001771 Name2 B1/Fridge 2011-12-01				
B							
C							
D							
E							

Section 8: Usage Summary

BxItems will keep an audit trail of all of your checked out items. The Item Usage summary will show all items that have been checked out and their usage history.

Click on "Item Usage – Browse" to view your checkout history.

My Group Items [Hide This Panel](#)

Add Items • Look Up • Check In • Check Out • Relocate

Total Items: **27** (124)

Unstored Items: **1** (1)

Stored Items: **27** (123)

Expiring Items(15 days): **0** (0)

Expired Items: **23** (104)

Low Quantity Items: **7**

Selected Items: **0**

Search Items: [Go](#)

[Item Usage: !\[\]\(ea457bfac0db6740bf72024e38b06a28_img.jpg\) Browse](#)

[» Advanced Item Tools](#) [» Import](#) [» From RxOrders](#)

[Search](#) [Browse All Records](#) [Set Default Columns](#) [Print Search Result](#)

List of Item Usages (Overall) (Displaying 1 - 9 of 9 records, Page 1 of 1.)

Export

No.	Item	Quantity	Type	First Usage	Last Usage
1	Reagent AAA	3	Checkout	2012-02-06	2012-03-23
2	Gloves	25	Checkout	2012-02-17	2012-02-17
3	USB 1	1	Checkout	2012-03-20	2012-03-20
4	USB 2	1	Checkout	2012-03-20	2012-03-20
5	Reagent B	1	Checkout	2012-05-08	2012-05-08
6	Sample B	1	Checkout	2012-05-14	2012-05-14
7	Chicken	2	Checkout	2012-06-07	2012-06-07
8	Chicken	1	Checkout	2012-06-12	2012-06-12
9	Reagent B	3	Checkout	2012-06-12	2012-06-12

Select an action Displaying 1 - 9 of 9 records, Page 1 of 1.

Section 9: Deleting Items

Items may be deleted from BxItems and will no longer be tracked in history, checkout, or usage. Deletion of items is semi-permanent, any deleted item can be retrieved if necessary.

Clearing a Container

To delete items by clearing a container, navigate to the container you wish to clear and use the "clear" button. This will clear all items in a container.

Container Tree View

Active Container: (Not set yet)

Search Container: Go

Set Active Add Update Copy Delete **Clear**

Item Tracking System

- ↳ **(Recycle Bin: 9)**
- ↳ Reagents Storage
- ↳ Samples Storage
 - ↳ Freezer 3
 - ↳ Shelf 2
 - ↳ Box2
 - ↳ Shelf 4
 - ↳ **Box 1**
 - ↳ Box 2
 - ↳ Box 3
 - ↳ Samples Storage 2
 - ↳ Supplies Room

Selecting Clear will delete all items from Box 1.

1.

Box:
↳ St
↳ Re
↳ M

A

Are you sure you want to clear all stored items?

- Yes, clear all stored items in this container.
- This container has sub-containers/grids.
- Yes, clear all stored items in all sub-containers/grids.

Submit

Select Items to Delete from Browse Items Screen

Navigate to the All items Screen, or search for your item. Check items to be deleted, and choose "Delete" from the pulldown menu at the bottom of the page.

The screenshot shows a table of items with columns: No., Name, Description, Expiration, Manufacturer, and Quantity Stored. Rows 15 and 16 have checkboxes checked. A red circle highlights row 16. A dropdown menu titled 'Select an action' is open at the bottom left, showing options: New, Update, Delete, and Export. The 'Delete' option is circled in red. At the bottom, it says 'Displaying 1 - 27 of 27 records. Page 1 of 1.'

No.	Name	Description	Expiration	Manufacturer	Quantity Stored	
15	Name5	This is description	2011-12-04	BioInfoRx	1	0
16	Chicken	This is description	2012-06-08	BioInfoRx	9	0
17	Name1	This is description	2011-12-01	BioInfoRx	1	0
18	Name2	This is description	2011-12-02	BioInfoRx	1	0
19	Name3	This is description	2011-12-03	BioInfoRx	1	0
20	Name4	This is description	2011-12-04	BioInfoRx	1	0
21	Name5	This is description	2011-12-05	BioInfoRx	1	0
22	Name1	This is description	2011-12-01	BioInfoRx	1	0
23	Name2	This is description	2011-12-02	BioInfoRx	1	0
24	Name3	This is description	2011-12-03	BioInfoRx	1	0
25	Name4	This is description	2011-12-04	BioInfoRx	1	0
			2011-12-05	BioInfoRx	1	0
			2012-05-15		7	0

Undelete Items

Any item can be undeleted. From the Main Items Screen, Select "Show Deleted Records." Select items to undelete and click "undelete."

Items: [All](#) - [Stored Items](#) - [Unstored Items](#) - [Low Quantity Items](#) - [Expired Items](#)

Search Browse All Records Set Default Columns Print Search Result

List of Deleted Items (Displaying 1 - 10 of 10 records. Page 1 of 1.)

The screenshot shows a table of deleted items with columns: No., Name, Description, Expiration, Manufacturer, and Quantity Stored. Rows 2 and 3 have checkboxes checked. A red circle highlights row 3. A dropdown menu titled 'Select an action' is open at the bottom left, showing options: New, Show Active Records, Undelete, and Export. The 'Undelete' option is circled in red. At the bottom, it says 'Displaying 1 - 10 of 10 records. Page 1 of 1.'

No.	Name	Description	Expiration	Manufacturer	Quantity Stored	
1	Reagent AAA		2012-03-23	AAA Reagents	0	
2	Gloves				0	
3	Reagent AAA		2012-03-23	AAA Reagents	0	
4	Reagent AAA		2012-04-04	AAA Reagents	0	
5	Reagent AAA		2012-03-23	AAA Reagents	0	
6	USB 2			Sony	0	
7	Reagent 4				0	
8	sample				0	
9	sample				0	
10	sample				0	

Select an action Displaying 1 - 10 of 10 records. Page 1 of 1.

Section 10: Exporting Items and Barcode Printing

Exporting Items

Items can be exported from the Main Items Screen. Search or browse for items to be exported, and click the Export Button. Items will be exported to Excel format.

Items: All - Stored Items - Unstored Items - Low Quantity Items - Expired Items



The screenshot shows a software interface for managing items. At the top, there are several buttons: 'Search' (magnifying glass), 'Browse All Records' (document icon), 'Set Default Columns' (pencil icon), and 'Print Search Result' (print icon). Below these is a title bar 'List of Items (Displaying 1 - 27 of 27 records. Page 1 of 1.)'. Underneath is a toolbar with icons for 'New', 'Update', 'Delete', and 'Export' (a document with a grid icon). The 'Export' button is circled in red. The main area is a table with the following columns: No., Name, Description, Expiration, Manufacturer, Quantity Stored, and Quantity Unstored. The data in the table is as follows:

No.	Name	Description	Expiration	Manufacturer	Quantity Stored	Quantity Unstored
1	USB 1			Sony	16	0
2	Reagent B		2012-05-09		17	1
3	ReagentA	New Reagent	2011-12-01	BioInfoRx	6	0
4	Reagent B		2012-05-09		7	0
5	Animal Sample				2	0

Barcode Printing

Any label printer can print barcodes from Excel files. Some may require software. Export the items to print barcodes, and print the barcode field (saving the file as csv is standard).

If you do not have specific software for printing barcodes, you can create them in your Excel file. You can use any add-in for Excel that will convert your barcode number to a barcode, or download the barcode font for Excel.